

Message Text

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PAGE 01 THE HA 02113 241606Z

44

ACTION COME-00

INFO OCT-01 EUR-12 ISO-00 EB-07 /020 W

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R 241504Z APR 75

FM AMEMBASSY THE HAGUE

TO SECSTATE WASHDC 5766

INFO AMEMBASSY BONN

UNCLAS THE HAGUE 2113

FOR COMMERCE BIC/OIM/MRD

E.O. 11652: N/A

TAGS: BEXP, NL

SUBJ: EVALUATION OF GLOBAL MARKET RESEARCH STUDY-LABORATORY
INSTRUMENTS, THE NETHERLANDS

REF: STATE -6850 OF SEPT 3, 1974

1. EMBASSY FINDS KINDEL STUDY WELL WRITTEN, THOROUGH AND CLEARLY MEETING RESEARCH SPECIFICATIONS. HOWEVER, WE DO NOT AGREE WITH HIS CONCLUSION THAT US SHARE OF MARKET DECLINING AND WE ARE UNABLE TO DETERMINE HOW HE ARRIVED AT FIGURES IN TABLE 3. EMBASSY IS NOT IN A POSITION TO VERIFY HIS ESTIMATES OF TOTAL LAB INSTRUMENT PRODUCTION, SALES OF INSTRUMENTS, OR HIS ESTIMATES OF PERCENTAGE OF EACH TYPE OF INSTRUMENTS USED IN LABS. NOR DO WE HAVE EXPERTIZE TO QUESTION HIS JUDGEMENTS ON PROS AND CONS OF CERTAIN INSTRUMENTS, FUTURE TECHNOLOGICAL DEVELOPMENTS, ETC.

2. A LIST OF COMMENTS, KEYED TO PAGES IN STUDY AND LIMITED TO MOST SIGNIFICANT POINTS, FOLLOWS.

PAGE 3 FIRST PARA. JOINT DUTCH/GERMAN FIRM, VFW/FOKKER, HAS WON CONTRACT FOR SPACE LAB.

PAGE 4- THIRD PARA. EMBASSY DISAGREES WITH CONCLUSION THAT MARKET SHARE DELCINING, FOR REASONS STATED BELOW. FURTHERMORE, THIS SECTION GIVES INACCURATE IMPRESSION THAT US INDUSTRY IN
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GENERAL PLAYS SMALL AND DECLINING ROLE IN MARKET WHEN IT LATER

MENTIONED ON PAGE 44 THAT HALF OF GERMAN IMPORTS COME FROM US SUBSIDIARIES AND OVERALL MORE THAN 50 PERCENT OF ALL INSTRUMENTS IN HOLLAND COME FROM US OR US SUBSIDIARIES.

PAGE 11/20-EMBASSY HAS PROBLEMS WITH TABLE 2 WHICH ON PAGE 20 SHOWS US MARKET SHARE OF TOTAL IMPORTS OF ALL CATEGORIES DECLINING FROM 1972 THROUGH 1974 AND BEYOND. IT SHOULD BE NOTED THAT IMPORT FIGURES FOR US IN 1972 ARE DISTORTED BY A ONE TIME VERY LARGE SHIPMENT OF NAVIGATIONAL EQUIPMENT (902822). EXCLUDING THAT CATEGORY LEAVES TOTAL US MARKET SHARE FOR ALL CATEGORIES AT AROUND 24 PERCENT IN 1972. LATEST DUTCH STATISTICS FOR JAN/NOV 74 SHOW US MARKET SHARE FOR ALL CATEGORIES INCREASING TO ABOUT 28 PERCENT. SIGNIFICANTLY, TWO MOST IMPORTANT CATEGORIES FOR US, 902900 AND 902836, ACCOUNTING FOR OVER HALF OUR EXPORTS, HAVE INCREASED SHARPLY.

PAGE 21-WE ARE UNABLE TO DETERMINE HOW TABLE 3 ARRIVED AT SINCE IT APPEARS TO BE NEITHER TOTAL OF US ACT AMT FOR EACH CATEGORY TIMES PERCENT FOR LAB USE NOR TOTAL OF US ACT AMT TIMES AVERAGE PERCENTAGE FOR LAB USE FOR ALL CATEGORIES.

PAGE 66-PARA K. NO ESTIMATE OF COST OF INSTRUMENTS OR PLANNED DATES FOR PROJECTS ARE GIVEN.

PAGE 80- SUGGEST THAT BEFORE 2.43.03 AN ADDITIONAL HEADING BE CREATED ENTITLED MULTINATIONAL SECTOR. THIS SHOULD INCLUDE EUROPEAN SPACE RESEARCH TECHNOLOGY CENTER (ESTEC), NOORDWIJK, HOLLAND, WHICH IS CHIEF RESEARCH ORGANIZATION FOR EUROPEAN SPACE AGENCY. MR. H.L.S. DE COMINCQ IS HEAD OF PURCHASING. ANOTHER WOULD BE SHAPE TECHNICAL CENTER, P.O. BOX 174, THE HAGUE 2076, NETHERLANDS, WHICH IS NATO BASED RESEARCH CENTER PROVIDING TECHNICAL AND SCIENTIFIC ADVICE TO SHAPE IN BELGIUM. MR. A.A.M. COPPIETERS IS HEAD, SUPPLY BRANCH.
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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 JAN 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: n/a
Control Number: n/a
Copy: SINGLE
Draft Date: 24 APR 1975
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: n/a
Disposition Approved on Date:
Disposition Authority: n/a
Disposition Case Number: n/a
Disposition Comment:
Disposition Date: 01 JAN 1960
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1975THEHA02113
Document Source: CORE
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Film Number: D750144-0674
From: THE HAGUE
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1975/newtext/t19750419/aaaaarkb.tel
Line Count: 96
Locator: TEXT ON-LINE, ON MICROFILM
Office: ACTION COME
Original Classification: UNCLASSIFIED
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 2
Previous Channel Indicators: n/a
Previous Classification: n/a
Previous Handling Restrictions: n/a
Reference: 75 STATE -6850, 75 OF SEPT 3, 75 1974
Review Action: RELEASED, APPROVED
Review Authority: ShawDG
Review Comment: n/a
Review Content Flags:
Review Date: 08 JUL 2003
Review Event:
Review Exemptions: n/a
Review History: RELEASED <08 JUL 2003 by SilvaL0>; APPROVED <03 FEB 2004 by ShawDG>
Review Markings:

Margaret P. Grafeld
Declassified/Released
US Department of State
EO Systematic Review
05 JUL 2006

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: EVALUATION OF GLOBAL MARKET RESEARCH STUDY-LABORATORY INSTRUMENTS, THE NETHERLANDS
TAGS: BEXP, NL
To: STATE
Type: TE
Markings: Margaret P. Grafeld Declassified/Released US Department of State EO Systematic Review 05 JUL 2006